

Department of Commerce National Oceanic Atmospheric Administration (NOAA)

TRANSIT BENEFIT PROGRAM Approving Official Guide For Supervisors, Budget And Transit Benefit POCs



Oversight Guidelines for Supervisors, Budget and Transit Benefit POCs

Background

The Department of Commerce National Oceanic Atmospheric Administration (NOAA)'s agencies/offices are responsible for verifying federal employees meet the requirements for participation in the transit benefit program as outlined in Executive Order 13150 *Federal Workforce Transportation*, April 21, 2000, and <u>DR 4080-811-4</u>. This includes determining that employees are using mass transit for the bulk of their commute to work.

The Department of Commerce National Oceanic Atmospheric Administration (NOAA) Transit Benefit Program Policy and Guidance requires agencies / offices to establish Points of Contact (POCs) for the National Capital Region and field offices.

- Transit Benefit Points of Contact (POCs) are responsible to communicate, coordinate, audit, and manage their agency transit benefit programs See Coordinator's listing for your POC.
- TRANServe provides guidance and serves as the point of contact for Transit Benefit Program Administration.
 - a. Contact Transit Benefit Manager Shunda Neal (Shunda.Neal@dot.gov)

Best Practices

To maintain integrity and program controls, Points of Contact (POCs) must conduct routine audits of transit benefit records.

Internal Controls include:

- A. Review monthly transit benefit billing reports for accuracy. The review should verify:
 - 1. Employees who have departed the agency are no longer receiving benefit. Cross check the transit benefit alphabetical listing with Human Resources records to ensure separated employees followed exit procedures and withdrew from the transit benefit program.
 - 2. Employees on extended travel or leave have not picked up a monthly benefit for the period they were not at their primary duty station.
 - 3. Employees who intermittently telework or drive should show as a reduced amount on the 6 month report
 - 4. Benefits are adjusted due to change of address
 - 5. Participants with a pickup record over the monthly statutory limit are reported to the agencies/offices/program office
 - 6. Participants must notify in writing of the policy requirements, when records show no adjustments were made due to parking.
- B. Verify transit benefit applications disclose/provide all information required by the OMB Memorandum, M-07-15 such as:
 - Expense Worksheet
 - The Employee's Home Address (including the street name)
 - The Employee's Work Address (including the street name)

C. Enforce the use of electronic fare media where available

Visit the TRANServe website at: http://transerve.dot.gov

Monitoring Guidelines

- Check the six month report for adjustments
 - o Participants are expected to adjust when they do not use mass transit
 - i.e. leave, travel, unscheduled telework, weather closure, driving, carpooling, or slugging
- When there are no adjustments:
 - o Talk to the participant...what is his/her work schedule?
 - o Check the method of transportation ... i.e. a monthly pass user would not have an adjustment
- When you believe adjustments should be made:
 - o Check the participant's leave history
 - o Check the participant's travel schedule
 - o Request the participant's pickup records from TRANServe
 - Request proof of no parking from the Parking Facility

Important Note:

DOC NOAA recommends all Transit Benefit Program Participants recertify their transit benefit and complete Transit Benefit Integrity Awareness training annually utilizing the honor system.

Visit the TRANServe website at: http://transerve.dot.gov

Start at the TRANServe.dot.gov

• Choose Participants:



- Click: DOC NOAA Transit Benefit Enrollment/Change Applications
- Log-in with your User Name and Password
 - ♦ Your government email address is your User Name
 - ◆ FIRST TIME ONLY Click "Register" to create an account"
 - A temporary password will be emailed to you



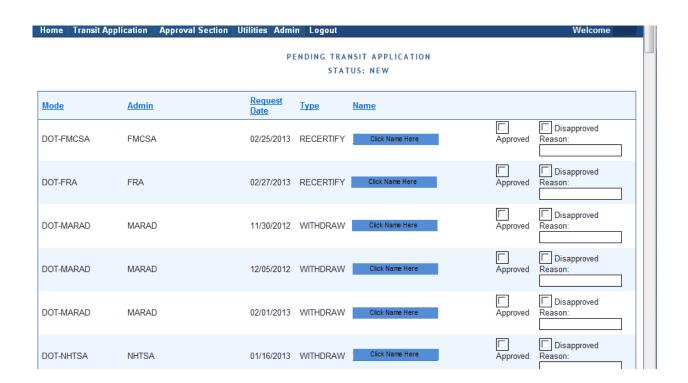
Application Types:

- 1) RECERTIFY/ENROLL
 - a. Recertification = existing participants
 - b. New enrollees
- 2) CHANGE
 - a. Information Change
 - i. Name, address, Line/Staff office, accounting, rate, method of transportation
- 3) WITHDRAWAL
 - a. Withdraw from the program
 - i. Reason (Opt out, retire or went to another agency)

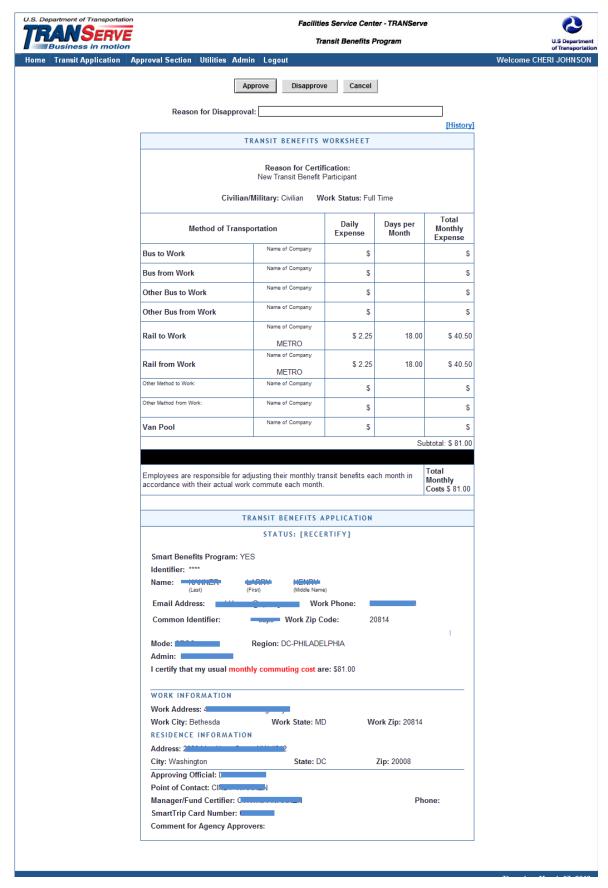
1. Select "Approval Section"



- 2. Select the correct queue:
 - a. <u>1st Approver</u> Select "Pending Supervisor"
 - b. 2nd Approver Select "Pending Budget Certifier"
- 3. Click the name to review



a. The application and expense worksheet are displayed



- 4. Review the Application
 - a. The Application must:
 - i. Specify name of Transportation Provider
 - ii. Indicate Daily, Weekly, Subtotal, Total Monthly Expense
 - b. The Approver must:
 - i. Verify the employee works for your Agency
 - 1. Check with your HR department, if needed
 - 2. Check the global directory
 - ii. Check SmarTrip® user entered number correctly
 - 1. Regional Field Offices enter "NA"
 - iii. Approve or Disapprove the Application
 - 1. Scroll to the top
 - a. Click "Approve" or "Disapprove"



iv. If disapproved, enter Instructions to Participant in "Reason for Disapproval"

Note: Click "[History]" to review past actions

- 5. View Past Applications
 - a. Select "Completed Records"



- b. Enter Participant's Name
- c. Click "Search"
 - i. Click Participant Name to choose record
 - 1. Review past application (if applicable)
 - 2. Click "Back" to look at another past application
 - **3.** Use this Navigation Bar to take another action

Home Transit Application Approval Section Utilities Admin Logout

Appendix A

Using the Proxy Feature

Add a Proxy

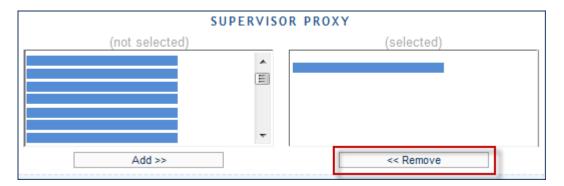
- 1. From the Home screen, click "My Account"
- 2. Click on your role
 - a. "Supervisor Proxy" or "Manager Proxy"



- 3. Select your designated Proxy from (not selected) list on the left
- 4. Click "Add" to move name to (selected) box.
- 5. Click "Update"

Reverse to Remove:

- 1. Click "Remove" to return name to the (not selected) box.
- 2. Click "Update"



Appendix B

<u>Sample: Six Month Report (M-70 January through June FY10) – names removed (xxx,xxx)</u>

AGENCY	NAME	MONTHLY COST	JAN10	FEB10	MAR10	APR10	MAY10	JUN10	TOTAL
DOT-OST-WCF M-	XXXXX,	¢220.00	¢220.00	¢220.00	¢220.00			¢220.00	Ć4 200 00
70 - 0402001000 DOT-OST-WCF M-	XXXX	\$230.00	\$230.00	\$230.00	\$230.00	\$230.00	\$230.00	\$230.00	\$1,380.00
70 - 0402001000	XXXXX, XXXX	\$128.00	\$100.25	\$85.80	\$66.45	\$94.50	\$101.45	\$104.25	\$552.70
DOT-OST-WCF M- 70 - 0402001000	XXXXX, XXXX	\$46.00		\$184.00				\$70.00	\$254.00
DOT-OST-WCF M-	XXXXX,	\$46.00		\$164.00				\$70.00	\$234.00
70 - 0402001000	XXXX	\$138.00					\$143.00		\$143.00
DOT-OST-WCF M- 70 - 0402001000	XXXXX, XXXX	\$230.00			\$460.00				\$460.00
DOT-OST-WCF M- 70 - 0402001000	XXXXX, XXXX	\$94.00	\$75.00	\$67.10	\$71.85	\$94.00	\$84.95	\$94.00	\$486.90
DOT-OST-WCF M- 73 - 1103002000	XXXXX, XXXX	\$104.00	\$60.75	\$47.45	\$80.00	\$70.70	\$41.50	\$84.20	\$384.60
DOT-OST-WCF M- 73 - 1103005000	XXXXX, XXXX	\$151.00	\$97.00	4 11110	\$100.00	\$75.00	\$89.00	\$130.00	\$491.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$120.00	\$75.00		\$100.00	\$73.00	\$65.00	\$130.00	\$175.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$104.00	\$104.00		\$100.00	\$104.00		\$104.00	\$312.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$136.00	\$104.00		\$136.00	\$104.00		\$104.00	\$136.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$126.00	\$126.00	\$126.00	\$126.00	\$126.00	\$126.00	\$126.00	\$756.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$161.00	\$129.00	\$70.00	\$134.00	\$139.00	\$65.00	\$81.00	\$618.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$108.00	\$104.00	\$104.00	\$104.00	\$108.00	\$108.00	\$108.00	\$636.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$158.00	\$136.00	\$91.00	\$131.00	\$125.00	\$126.00	\$131.00	\$740.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$142.00	\$68.00	\$68.00	\$118.00	\$140.00	\$140.00	\$140.00	\$674.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$136.00	\$136.00	\$136.00	\$136.00	\$136.00	\$136.00	\$136.00	\$816.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$176.00	\$176.00	\$176.00	\$176.00	\$176.00	\$176.00	\$176.00	\$1,056.00
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$83.00	\$83.00	\$83.00	\$62.00	\$83.00	\$52.80	\$83.00	\$446.80
DOT-OST-WCF M- 73 - 1103006000	XXXXX, XXXX	\$142.00	\$122.00	\$122.00	\$95.00	\$122.00	\$122.00	\$122.00	\$705.00

Your National Transit Benefit Office is here to assist Approvers

Please e-mail questions to:

Sharon.Depiso@noaa.gov

Or

Shunda.Neal@dot.gov

Or

Visit http://transerve.dot.gov

